

FACILITIES MAINTENANCE AND ENGINEERING PROCEDURE		
Subject: TECHNICAL PROPOSAL EVALUATION	FMEP-P-0270	Rev. No. 1
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1.0 PURPOSE

To define the requirements for the preparation, review, and control of a Technical Proposal Evaluation (TPE).

2.0 GENERAL

2.1 Description and Applicability

The proposal evaluations are composed of two parts: the TPE, which is the responsibility of Facilities Maintenance and Engineering (FME), and the Proposal Evaluation, which is the responsibility of Construction Contracts or Acquisitions and Logistics Services. This procedure applies to the TPE only.

2.2 Definitions

Proposal Tabulation - A commercial document prepared by Construction Contracts or Acquisitions and Logistics Services to summarize the pricing, technical and commercial aspects of proposals received for a specific Purchase Request. The Proposal Tabulation serves as a basis to obtain approvals prior to commitment to a supplier.

Commitment – An agreement to provide consideration or remuneration to a supplier in return for the supplier’s delivery of goods or performance of services.

Purchase Request (PR)- A generalized term for the document, which identifies the material, equipment, or services that require an action.

Technical Proposal Evaluation (TPE) – A document prepared by Facilities Maintenance and Engineering (FME) to summarize the technical aspects of proposals received for a specific Purchase Request. The TPE provides a comparison of the key technical and quality features offered by the supplier versus the specified requirements, and provides a recommendation based on technical and quality merit.

Technical Summary of Proposals – A tabulation of key technical specification criteria and corresponding supplier technical quote data.

3.0 PROCEDURE

3.1 Solicitation of Proposals

Proposals are solicited by Construction Contracts or Acquisitions and Logistics Services, and routed to FME for preparing the TPE.

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3.2 Technical Proposal Evaluation

3.2.1 Technical Considerations

The FME Responsible Engineer shall review the technical data to determine whether or not proposals conform to the technical requirements of the proposal package (including technical specifications and engineering drawings). Additional considerations shall include but not be limited to:

- Operability and maintainability features
- Performance Guarantees
- Material sources (foreign or domestic)
- Exceptions to the technical requirements and engineering resolutions
- Startup and Operational Spare parts
- Special tools and all equipment necessary to complete the work required by the contract
- Drawings or engineering data submittal schedules
- Confirmation of scope, interfaces and functionality
- Inspection and testing requirements
- Options

Technical questions that arise during the TPE shall be directed in writing to Construction Contracts or Acquisitions and Logistics Services Representative for coordination with the Offerer. The Construction Contracts or Acquisitions and Logistics Services Representative will ensure that any variations or additional technical information that modifies the proposal in any manner, will be promptly confirmed by the Offerer in writing.

The FME Responsible Engineer shall document

The FME Responsible Engineer shall document the results of the technical evaluation and acceptability of the Offerers, based on conformance with the technical requirements of the technical specification and/or Purchase Request, by the use of the cover sheet and written text (Exhibit A). In addition, at the discretion of the FME Responsible Engineer or at the reviewer's request, a Technical Summary of Proposals may be attached or appended to the TPE. The Technical Summary of Proposals, Exhibit B, is necessary, if in the responsible Construction Contracts or Acquisition and Logistics Services Representative's opinion, the summary will aid in understanding the differences between equipment/materials/services being offered by the various Offerers, and necessary to support the "technically acceptable" or "technically unacceptable" conclusion. For unique or highly engineered commodities, the Technical Summary of Proposals shall be provided.

Note: For sole source proposals, the TPE may be documented using Exhibit C, Sole Source Technical Proposal Evaluation. Use of Exhibit C is at the discretion of the responsible FME Responsible Engineer.

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3.2.2 Considerations

Questions, including terms, cost, schedule and delivery that arise during TPE shall be directed to the Construction Contracts or Acquisitions and Logistics Services Representative for resolution.

3.3 Approval Process

The TPE shall be signed by the FME Responsible Engineer and Checker, and approved by the Manager of Engineering .

The Manager of Engineering shall forward the completed TPE to the Construction Contracts or Acquisition and Logistics Services Representative. The Construction Contracts or Acquisition and Logistics Services Representative will integrate the TPE with the commercial evaluation and obtain all necessary approvals.

The Project Manager shall resolve any disapproval of the recommendation based on technical considerations.

3.4 Confidentiality

All proposals and TPEs contain information of a highly sensitive technical and commercial nature and must be treated as confidential. They must only be distributed to persons having a "need to know". They must not be allowed to fall inadvertently into the hands of any Offerer representatives who might gain technical and/or commercial advantage. The Manager of Engineering shall ensure that all assigned engineering personnel, having access to these documents, are fully apprised of the need to maintain confidentiality, and shall implement such security measures as are appropriate to assure that this confidentiality is maintained.

3.5 Revision Control

Revisions to the TPE shall be controlled using sequential numeric revision designators (i.e., 0, 1, etc.), beginning with the initial issue for use. Revised material shall be identified using revision bars in the right margin adjacent to the revised material.

FMEP-P-0270 Exhibits

Exhibit A – Technical Proposal Evaluation Cover Sheet and Content Requirements (Typical)(3 pages)

Exhibit B – Technical Summary of Proposals (Typical)(1 page)

Exhibit C – Short Form – Sole Source Technical Proposal Evaluation (Typical)(1 page)